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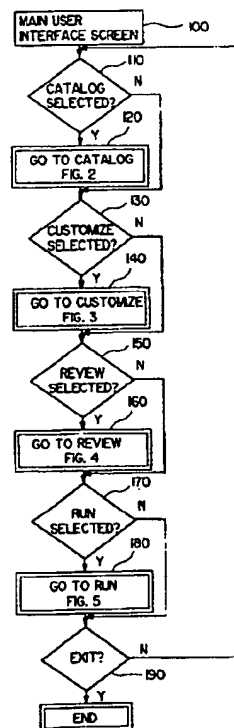
INTERNATIONAL APPLICATION PUBLISHED UNDER THE PATENT COOPERATION TREATY (PCT)

|   |  |   |   |
|---|--|---|---|
| (51) International Patent Classification <sup>6</sup> :<br><b>G06F 17/24</b>  |  | <b>A1</b>   | (11) International Publication Number: <b>WO 95/07510</b>     |
|   |  |   | (43) International Publication Date: 16 March 1995 (16.03.95) |
| (21) International Application Number: <b>PCT/US94/10236</b>  |  | (81) Designated States: AU, BR, CA, CN, JP, KR, NZ, PL, RU, European patent (AT, BE, CH, DE, DK, ES, FR, GB, GR, IE, IT, LU, MC, NL, PT, SE).   |   |
| (22) International Filing Date: 7 September 1994 (07.09.94)   |  |   |   |
| (30) Priority Data:<br>08/117,463 7 September 1993 (07.09.93) US  |  | <b>Published</b><br><i>With international search report.<br/>Before the expiration of the time limit for amending the claims and to be republished in the event of the receipt of amendments.</i> |   |
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(54) Title: METHOD AND SYSTEM FOR AN ELECTRONIC FORMS GENERATION USER INTERFACE

(57) Abstract

A computerized electronic forms generation system for the electronic completion, printing and filing of forms is provided. The user is presented with a catalog of graphically represented form-templates, from which the user selects form-templates to customize. After customization and review, the user has access to a catalog of graphically represented customized forms to complete, modify, file or delete. The electronic forms generation system allows the user to inspect visually the forms and form-templates in various sizes, enabling the user to scale the forms from a full-size representation to an all-on-one screen representation. A "point and click" method, using a display screen, a keyboard and mouse, enables the user (1) to select a form-template and (2) to enter the custom information in answer to the system prompts. The system also manages complex file functions during the completion, filing and printing of the forms without intervention by the user. The system provides for the generation of printed blank or completed customized forms.



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**METHOD AND SYSTEM FOR AN  
ELECTRONIC FORMS GENERATION USER INTERFACE**

**FIELD OF THE INVENTION**

5           The present invention relates in general to  
electronic forms generation systems and the electronic  
creation, completion, printing and filing of forms. In  
particular, this invention relates to a method and system  
for selecting a form-template from an existing catalog of  
10 graphically represented form-templates, customizing the  
form-template, thereby creating a personalized catalog of  
graphically represented customized forms, and thereafter  
completing and processing these customized forms.

**BACKGROUND OF THE INVENTION**

15           In connection with microcomputers and computer  
work-stations, there are a number of electronic form  
generation systems available to facilitate the task of  
creating electronic forms, completing these forms and  
20 then printing, filing or otherwise processing these  
forms. These prior art systems for the creation of  
electronic forms require the use of complicated multi-  
step instruction sets. On the basis of training and  
experience in using sophisticated instructions, rules and  
25 protocols, the user learns to create these forms  
utilizing electronic tools.

          Some such systems include sample forms. First,  
sample forms must be located by using a complex filing  
system. After locating the sample forms, they must be  
30 examined to determine their suitability for the intended  
purpose. Any generic name and address references must be  
removed and replaced with the user's customized  
information. The user then gives this new customized  
form an identifying name, which is later employed to  
35 retrieve it from the system. Third, the newly completed

form is re-filed through the same complicated file-naming convention originally used to locate it.

To re-access these customized forms, the user must be familiar with the system's file-naming conventions and must remember the name assigned to each customized form. Without the name, the user may have to recall and review every form stored in the system. These processes demand significant amounts of education by the user and also require numerous keystrokes to proceed through the program to achieve the desired result.

Some forms-generation packages which use these conventions are JetForm™ form generation software from JetForm Corporation, PerForm Pro Plus™ form generation software from Delrina Technology Incorporated, FormWorx™ from Spinnaker Software Corp., Informs™ from Word Perfect Corporation and Windform™ from Windform Corporation.

#### SUMMARY OF THE INVENTION

Accordingly, an object of the present invention is to provide an improved forms generation method and system in which a personal-computer user, who lacks experience or training with said system, may (1) select form-templates from a catalog of graphically represented pre-designed form-templates, (2) customize these form-templates with name, address, phone number and other custom information in order to (3) create a catalog of customized forms. Once created, this graphically represented catalog readily allows for the selection of customized forms along with the completion, printing, filing and deletion of the customized forms.

A further object of the invention is to provide the user with an interface which enables the user more easily to generate, complete and file forms.

Additionally, an object of the present invention is to create an electronic forms generation system that uses available complex forms generation software as the basis for the improved electronic forms generation systems of the present invention.

A further object of the present invention is to enable the user of an electronic forms generation system to visually inspect the forms and form-templates in various sizes, enabling the user to scale the forms from a full-size representation to an all-on-one-screen representation.

The electronic forms generation system of the present invention consists of hardware and software. An electronic forms generation system according to the present invention would require, at a minimum, a personal computer, personal workstation, microcomputer or equivalent with an 80386 microprocessor or equivalent and at least 4MB RAM and storage capacity of at least 40MB. An operating system under which the software of the present system operates is Windows™ from Microsoft Corporation or an equivalent graphical user interface such as OS2 from IBM, System 7.0™ from Apple Corporation or NextStep™ from NEXT Corporation. Additionally, a complex electronic forms generation software package such as JetForm™ form generation software from JetForm Corporation, PerForm Pro Plus™ form generation software from Delrina Technology Incorporated, FormWorx™ from Spinnaker Software Inc., Informs™ from Word Perfect Corporation or WindForm™ from Windform Corporation is used as part of the system. One skilled in the art could develop an electronic forms generation system, providing through his or her own software, functions similar to those provided by the commercial software application packages described above.

The electronic forms generation system presents to the user a catalog of graphical representations of the form-templates. A "point and click" method, using a display screen, a keyboard and mouse, enables the user  
5 (1) to select a form-template and (2) to enter the custom information in answer to the system prompts. The system itself manages the sophisticated functions; it assembles a custom catalog of graphically-represented form-templates and combines the customizing information with  
10 each form-template. Therefore, the ordinary computer user is not required to understand complex programming techniques or to comprehend sophisticated instruction sets or program rules and conventions.

Further, the size of the graphical representations displayed in the forms system can be adjusted by  
15 the user from full size to an all-on-one-screen reduced size. This allows the user to create visually and review a form-template in various sizes rather than only a portion of the form-template.

20 The system also manages the completion, filing and printing of the forms (blank or completed) as required by the user, without intervention by the user. This present system can be used by computer users who are untutored in its use, because it does not require the  
25 learning of difficult or complex user interface commands, rules or conventions, such as those required for filing and retrieving forms in the prior art systems.

#### BRIEF DESCRIPTION OF THE DRAWINGS

30 FIG. 1 is a flow diagram depicting the flow of system control from the main user interface in an embodiment of the present invention.

FIG. 2 is a flow diagram depicting the catalog function as implemented in an embodiment of the present invention.

FIGS. 3A and 3B are flow diagrams depicting the customize function as implemented in an embodiment of the present invention.

FIG. 4 is a flow diagram depicting the review function as implemented in an embodiment of the present invention.

FIG. 5 is a flow diagram depicting the run function as implemented in an embodiment of the present invention.

FIG. 6 is a depiction of the main user interface screen as implemented in an embodiment of the present invention.

FIG. 7 is a depiction of the form-template catalog as implemented in an embodiment of the present invention.

FIG. 8 is a depiction of the customize user interface screen as implemented in an embodiment of the present invention.

FIG. 9 is a depiction of the logo selection screen as implemented in an embodiment of the present invention.

FIG. 10 is a depiction of the layout selection screen as implemented in an embodiment of the present invention.

FIG. 11 is a depiction of the review screen as implemented in an embodiment of the present invention.

FIG. 12 is a depiction of the custom catalog as implemented in an embodiment of the present invention.

### DETAILED DESCRIPTION OF THE INVENTION

In a preferred embodiment of the present invention an electronic forms generation system includes a central processing unit, a memory, a user data input device, a data display device, a data storage device, a printer, a computer operating system, an electronic forms generation software application and a software-implemented user interface. The user interface, in conjunction with the hardware described above, presents to a user a catalog of graphically represented form-templates. The user is provided an interface with which to graphically review and select form-templates for a custom form catalog. The selected form-template is then customized by the user. The customized form is graphically reviewed by the user and, if approved, becomes part of the user's custom form catalog. The customized forms from the custom form catalog can then be completed, filed, modified or deleted. Completed or blank customized forms can be generated through the printing device.

The electronic forms generation system of the present invention comprises both hardware and software components. An electronic forms generation system according to the present invention would require, at a minimum, a personal computer, personal workstation, microcomputer or equivalent with an 80386 microprocessor or equivalent and at least 4MB Random Access Memory (RAM) and storage capacity of at least 40MB. The storage capacity could be a magnetic disk, such as a hard disk or floppy disk drive and the requisite software drivers. Also, a printer and its associated printer driver is necessary to generate hard-copy printouts of the completed or blank forms.



The software necessary to operate the system comprises an operating system under which the software of the present system operates, i.e. Windows™ from Microsoft Corporation or an equivalent graphical user interface  
5 such as OS2 from IBM, System 7.0™ from Apple Corporation or NextStep™ from NEXT Corporation. Additionally, a complex electronic forms generation software package such as JetForm™ form generation software from JetForm Corporation, PerForm Pro Plus™ form generation software  
10 from Delrina Technology Incorporated, FormWorx™ from Spinnaker Software Inc., Informs™ from Word Perfect Corporation or WindForm™ from Windform Corporation is used as part of the system. Alternatively, the underlying complex forms generation package could be  
15 developed by one skilled in the art to provide the functions found in the commercial software application packages described above.

The electronic forms generation system of the present invention, as disclosed herein, presents to the  
20 user graphical representations of form-templates comprising a catalog of form-templates. The form-template catalog is supplied to the user as part of the system. The system presents to the user electronic forms and form-templates in an environment more like the  
25 traditional non-electronic environment, i.e., visually. The system manages the generation of graphical form representations and permits the user to customize forms using a user interface of visual representations. FIG. 1 illustrates the flow of the system from the main user  
30 interface screen 100.

The main user interface screen as depicted in FIG. 6 prompts the user with a series of "buttons." Using the user input devices such as the keyboard or mouse, the user selects a "button" with an electronic

pointer shown on the user interface screen by an arrow and then clicks on the catalog button by depressing a button on the keyboard or mouse. One skilled in the art can appreciate that other devices such as a touch  
5 sensitive screen or joystick and keyboard combination could allow the user to "point and click" at various user interface screen "buttons". The system, waiting for the user input 110, 130, 150, 170, i.e., the positioning of the electronic pointer and the button depression, reacts  
10 by sending control to one of four sub-routines: catalog 120, customize 140, review 160 and run 180.

The first time a user operates the system no custom catalog for the user exists. The system identifies the first time user by determining whether  
15 custom forms exist in the system. During the first use of the system by the user, the catalog button is highlighted in some way so as to notify the user that no other function can be selected. Thus, the system prompts the user to create his or her custom catalog. If custom  
20 forms exist, then the system has already been used and the first-time user set-up will be bypassed, unless the user specifically requests to run the set-up procedure during a subsequent use of the system. The user exits the program in a preferred embodiment through the exit  
25 "button".

Once the catalog "button" is selected by the user, the system presents the user with a catalog of graphically represented forms. FIG. 7 depicts one possible configuration of the catalog of form-templates  
30 with which the user is presented.

FIG. 2 depicts the flow of the system during use of the catalog function 120. The user reviews the displayed graphical catalog 225, by viewing various pages of the catalog 230 and selects a form-template category

240 by pointing and clicking on a graphical representation of a form-template within a category. Prior to selection, additional pages of the form-template catalog may also be viewed by the user 230. The name of  
5 the category is included in the graphical representation.

Upon selection of the category, the user is presented with multiple choices of form-templates 245 within that category, each being distinctive in its appearance and usage. For example, in a category  
10 entitled "Fax cover sheets" entries might appear for 8 1/2 inch by 11 inch, legal sized, portrait, or landscape facsimile cover sheets. Each form is represented by an accurately scaled graphical representation of the form with a brief description of the type of form which it  
15 represents. The user can select 250 any of the choices by pointing and clicking on that graphical representation using the electronic pointer controlled by the mouse and a button on the keyboard or mouse. The choice is then scaled to a larger size and displayed.

20 The user is provided different form size choices from actual size to a reduced but recognizable size depicting the entire document 260. The user is also provided with "point and click" screen buttons allowing for the navigation around and review of all parts of the  
25 form.

After sufficiently examining the form-template and being satisfied with the choices, the user points and clicks the select button to select the form-template for the user's custom catalog. The system then marks 270  
30 that form-template as being selected for the custom catalog, and the program returns the user automatically to the main catalog screen 225. On that screen, the user is notified that he has selected a form-template for that category. The process is continued on a category-by-

category basis, allowing the user to select or bypass any of the offered categories and the form-templates therein until the user has completed the review 280.

At the end of the process, the user is returned  
5 to the main screen 290. The system acknowledges that the user has finished with the review of the catalog process and notifies the user by modifying the catalog "button" or placing a check next to the catalog "button", and prompts the user to select the next step, "customize"  
10 140.

FIGS. 3A and 3B are diagrams that depict the flow of the system during the customize process. The user points and clicks the customize button and is presented with a screen in which he is asked to enter his  
15 corporate name 310. FIG. 8 depicts the user interface screen for the customize function in one embodiment of the present invention. Once the user has input the corporate name, the system provides the user with type style choices 312. The user is presented with the names  
20 of the type styles on the screen next to the corporate name. The user may point and click on any type style and the system automatically changes the previously typed name into that type style 314. Thus, each type style may be visually reviewed by the user permitting the user to  
25 select the appropriate type style 316.

The next user interface window of the customize interface screen prompts the user for the address, zip code, and the pertinent telephone, facsimile or other numbers 320. The user then again selects the appropriate  
30 type style using the previously described method 322, 324, 326. The name and the address type styles may be different from each other.

After inputting the name and address and selecting the type style, the user is offered the option

to select a logo 330 by the using the "point and click" method on the "select logo" button depicted on the user interface screen. The user interface then presents the user with a new screen giving the user a number of "point and click" buttons on the screen allowing the user to choose various methods of inputting a logo 332. FIG. 9 is a depiction of the logo selection screen of one embodiment of the present invention. The first choice is to select a standard logo 340. Upon selecting that "button", the user is given a selection of pre-drawn generic logos with representations of different industries, professions, locales, animals, plants or other various logo selections 342. The user can choose any of these standard drawings by using the previously described "point and click" method 344. The system then stores the logo selection for the form-template 346.

The next logo "button" selection allows the user to import a custom graphic of the user's own logo from the disk drive 350. These custom logos have been either drawn or scanned into any of several acceptable standard computer conventions and put on diskette, magnetic hard disk, CD-ROM (optical disk) or other data storage medium. The method for loading this information into the computer is to insert the storage medium into the computer if necessary and type a command which causes the computer to load the information from the medium into the system 352. The third choice is to allow users of Windows™ operating system software to import a file containing a logo which would previously have been placed in the imported files by the user 360. The imported file could be brought into the Windows™ operating system environment from a magnetic or optical storage media, drawn in the environment with a drafting package or scanned into the Windows™ operating system environment.

In either case the user must input a file name, 352 or 362 and the system must store the file for the custom or windows logos 354 or 364. The fourth selection is for "no logo", meaning that no custom logo will be inserted on the form 370.

Once the logo selection has been completed, a screen showing the name, address, type styles and logo is displayed and the user is presented with a "continue" button. The "continue" button is pressed (through the "point and click" technique) and the user is then provided with a selection of layouts 380 in which the user's name, address and numbers as well as the logo are depicted together with various spatial relationships so as to allow the user to custom select the appearance which is most pleasing to the user. FIG. 10 is a depiction of the layout screen of one embodiment of the present invention. The graphical depiction of a number of spatial relationships enables the user to customize the form-template without having to use a complex set of electronic tools.

Any reduced-size customized spatial relationship can be reviewed full size by pointing and clicking on the button which contains the graphical representation of the spatial relationship. The appropriate spatial layout is selected 385 through "point and click" and the user is then returned 390 to the main screen 100.

The main user interface screen then indicates that the user has completed both the "catalog" and "customize" sections of the system and is prompted to select "review" 160. The user points and clicks the "review" button and a user interface screen is displayed showing the review screen with each previously selected form-template represented in a reduced but accurate

graphical representation of the actual form with custom information. FIG. 11 is a depiction of one possible review screen presented to the user in a preferred embodiment of the present invention. During the review process, the custom catalog includes a place to mark those documents reviewed by the user.

FIG. 4 is a diagram of the system flow during the review process. Each form in the displayed custom form catalog 410 includes the appropriate category name inserted on the button with the form. By selecting 412 a form "button" the user is presented with a graphical representation, all on one screen, of the form 416 including the user's custom information. All information is properly laid out and sized to fit the form. The user is presented with an additional on-screen "button" permitting the user to review the form in various sizes from actual size to the entire form on one screen 417, 418. The user may also further customize the form by enlarging or reducing the size of the custom information 420, 430 as well as its position on the form 440, 450.

After selecting the appropriate sizes and locations and selecting the number of copies to print 455, the user can elect to approve the form 460 at which time the system marks the form approved 470. The program then provides the user with the next form for the same process 480. Alternatively, the user is given the option to review each form before approving any of the forms by clicking a "next selection" button. Once all the forms have been approved, the program automatically returns the user 490 to the main user interface screen 100.

At this point, the user has provided all the necessary information and made the necessary choices so as to create his own catalog of customized forms and has reviewed the forms. The program acknowledges that he has

completed the first three steps and prompts him to proceed to the fourth step "run" 180. From this point forward, when the user selects the "run" button, the system automatically retrieves the user's customized form catalog from secondary storage, such as the hard disk drive of the system. If, at some time in the future, the user desires to add a form, delete a form, or re-customize a form, the user can then go through the previously described "set-up" procedure again. Unless such a change is requested, the system presents the user with the customized forms catalog. FIG. 5 depicts the flow of the system during the run function. After selecting the "run" button, the user is presented with the custom form catalog 510 of graphical representations of the customized forms in accurate but reduced form. FIG. 12 depicts one possible custom form catalog that is presented to the user in a preferred embodiment of the present system. Using the point and click method the user can select a graphical representation of a form category 512.

The user is then presented with a user interface screen containing two buttons: one for selecting blank forms and a second for selecting completed and filed forms. The blank forms "button" is a small graphical depiction of the blank form 524 in a preferred embodiment of the present invention. The filed forms "button" is a small graphical representation of a file folder 522 in a preferred embodiment of the invention. By clicking on the blank form 524, the user selects the option of completing a blank form 530 and is presented with a blank customized form, in full-size 532. Every field of the form can be completed by the user. The completion data is collected 534 and stored 536 by the system in memory or the data storage device. The



first field is selected and each subsequent field is automatically selected once the previous field has been completed.

By selecting the file folder 538 the user is presented with a selection of previously filed forms that reside in that file folder 539. The user may then retrieve one of these completed form 540 which is then displayed by the system 541.

Additional "buttons" allow the user to either print 550, delete 560 or file 570 the completed form. To print the form, the user simply presses the print "button". The system will automatically print one form unless the user selects a different default number to be printed. If desired, the form can be printed in blank before it is completed or it can be printed after being completed. The completion data template and custom data form will print together simultaneously 552. There is no need for the user to specify separate data and form files in the system for printing. The data files are then merged 554 and sent to the printer 556.

When the user wishes to file 570 a completed or modified form, the user selects the file button and is prompted with a window which requests him to specify a descriptive name 572 for the completed form. The user types in a name for the completed form and indicates that he is done, at which point the form is automatically filed in the system's file cabinet, i.e., magnetic or read/write optical storage. The form is automatically filed in a folder marked by the descriptive name of the form category, i.e., "facsimile cover sheets", or "expense reports". The descriptive name is preferably on or near the file folder or its "button". All related data files for the completed form are stored by the

system 574. Thus, the user need remember only one descriptive file name to recall a completed form.

To locate a previously filed form, the user first determines the category of form from the main custom catalog selection screen 510 and selects a form category 530. The user is then given a choice of selecting a blank form 530 or filed forms 538 in the file folder within that category. When selecting the filed forms, the category of the file folder is displayed open with an accurately reproduced miniature graphical representation of each filed form with the file name displayed within the button image of that form. In a preferred embodiment the file name is placed on the filed form button. Alternatively, the name of the form should be placed near the filed form button to which it refers. By clicking on the graphical representation, the form is automatically retrieved 540 and displayed to the user 541. The user then has a choice of printing 550 the form, filing the form 570, modifying 542 the completion data for that form or deleting the form 560 by clicking on the form "throw-out" button. In filing the form 570, the user is prompted for a descriptive file name which is used to identify the document 572. Upon completion, the user may elect to return to the main screen 590 by pointing and clicking on the "back to steps" button.

A preferred embodiment of the present invention provides the user with a pre-customized catalog of graphically represented forms. This system enables the user to complete forms with user data, file the forms and print the forms without requiring the user itself to customize the forms. Thus, this embodiment of the forms generation system provides the user with a limited set of functions, simplifying the user interface to a greater

degree than the other preferred embodiment described herein.

The user is presented with the same type of graphically reprinted forms. However, rather than form-  
5 templates, which the user must customize, this embodiment of the system supplies the user with pre-customized forms. The user selects the pre-customized form to complete. The form is then retrieved automatically by the system and the user is presented with data fields for  
10 the input of form completion data. The completed form may then be filed, deleted, or printed by the user as with the first embodiment. FIG. 5 depicts the flow of data during use of this embodiment of the system and FIG. 12 depicts one possible custom catalog of graphically  
15 represented custom forms which would be presented to the user in this preferred embodiment of the system.

The foregoing description of the invention describes only two of the preferred embodiments of the present invention. It should be appreciated that  
20 modifications could be made by those skilled in the art to the embodiment described herein and that such modifications would still result in a system that is within the scope of the invention as claimed below.

**CLAIMS**

1. An electronic forms generation system,  
including a central processing unit, a memory, a user  
data input device, a data display device, a data storage  
5 device, a printer, an operating system, electronic forms  
generation application software and a software-  
implemented user interface including:
- means for presenting to a user a catalog of  
graphical representations of form-templates;
  - 10 means for graphically reviewing and selecting  
form-templates;
  - means for customizing selected features of the  
selected form-template to create a customized form;
  - means for graphically reviewing the customized  
15 form;
  - means for completing a customized form; and
  - means for generating blank and completed  
customized forms.
- 20 2. The electronic forms generation system of claim  
1 wherein the means for reviewing the form-templates and  
customized forms includes means for scaling the graphical  
representation of the form or form-template.
- 25 3. The electronic forms generation system of claim  
1 wherein the system includes means for printing forms  
and a means for storing completed forms.
4. The electronic forms generation system of claim  
30 1 wherein the system includes means for inputting form  
completion data.

5. The electronic forms generating system of claim 4 including means for merging the customized form with the form completion data file without user intervention.

5 6. An electronic forms generation system, including a central processing unit, a memory, a user data input device, a data display device, a data storage device, a printer, a computer operating system, electronic forms generation application software and a  
10 software-implemented user interface including:  
means for presenting to a user a catalog of graphical representations of customized forms;  
means for reviewing the customized forms; and  
means for generating blank and completed  
15 customized forms.

7. The electronic forms generation system of claim 6 including means for scaling the graphical representation of the form.  
20

8. The electronic forms generation system of claim 6 including means for printing forms and a means for storing completed forms.

25 9. The electronic forms generation system of claim 6 including means for inputting form completion data.

10. The electronic forms generating system of claim 9 including means for merging the customized form with  
30 the form completion data file without user intervention.

11. An electronic forms generation method comprising the steps of:

presenting the user with a catalog of graphical representations of form-templates;

5 allowing the user to review and select a form-template;

presenting the user with selected features of the selected form-template;

10 allowing the user to customize the selected features of the form-template;

presenting the user with a graphical representation of the customized form-template for review and modification of the customized features in order to generate a customized form;

15 allowing the user to select a customized form;

allowing the user to complete form data fields on the selected custom form;

generating the completed customized form;

printing the completed form; and

20 filing of the completed form.

12. The electronic forms generation method of claim 11, including the steps of:

retrieving the form-template;

25 retrieving the customization data;

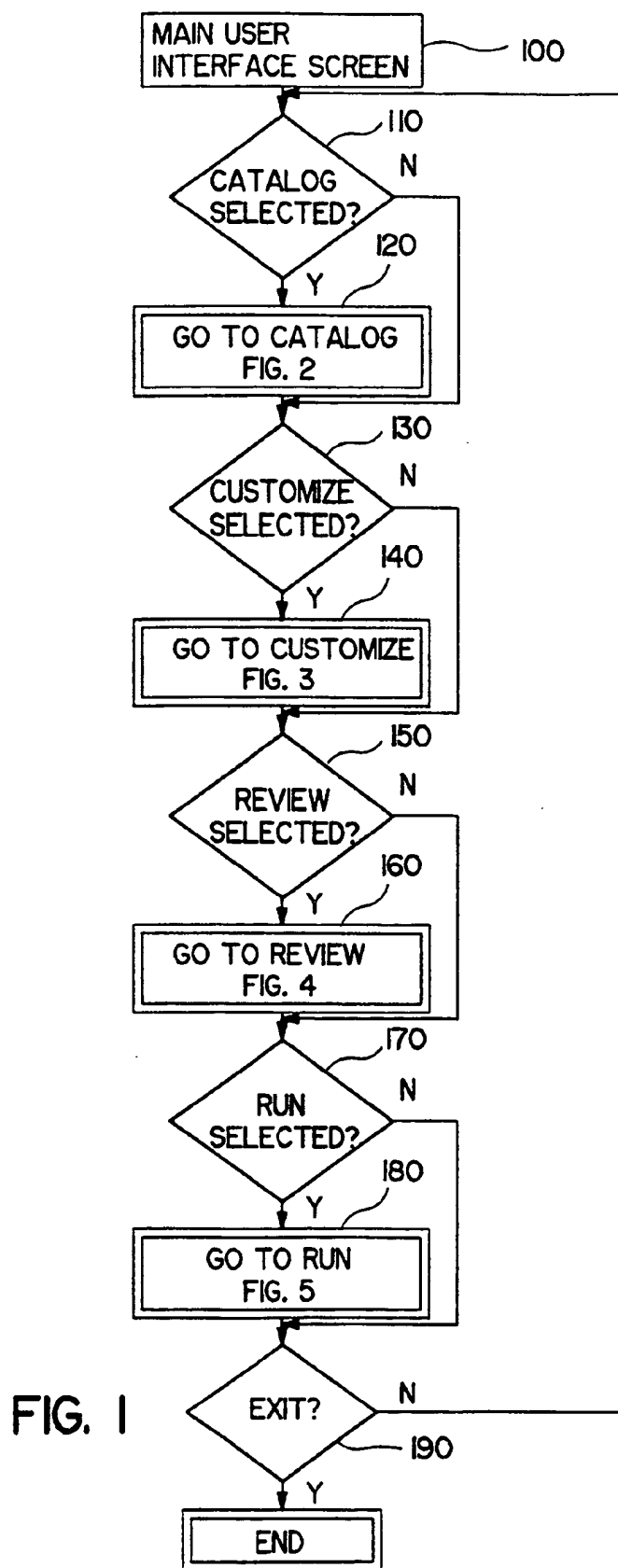
retrieving the form completion data; and

merging the form-template, customization data and form completion data without user intervention.

30 13. An electronic forms generation method comprising the steps of:

presenting the user with a catalog of graphical representations of customized forms;

- allowing the user to review a set of  
customized form;  
allowing the user to select a customized form;  
allowing the user to complete form data fields  
5 on the selected customized form;  
generating the completed customized form;  
printing the completed form; and  
filing the completed form.
- 10 14. The electronic forms generation method of claim  
13, including the steps of:  
retrieving the form-template;  
retrieving the customization data;  
retrieving the form completion data; and  
15 merging the form-template, customization data  
and form completion data without user intervention.





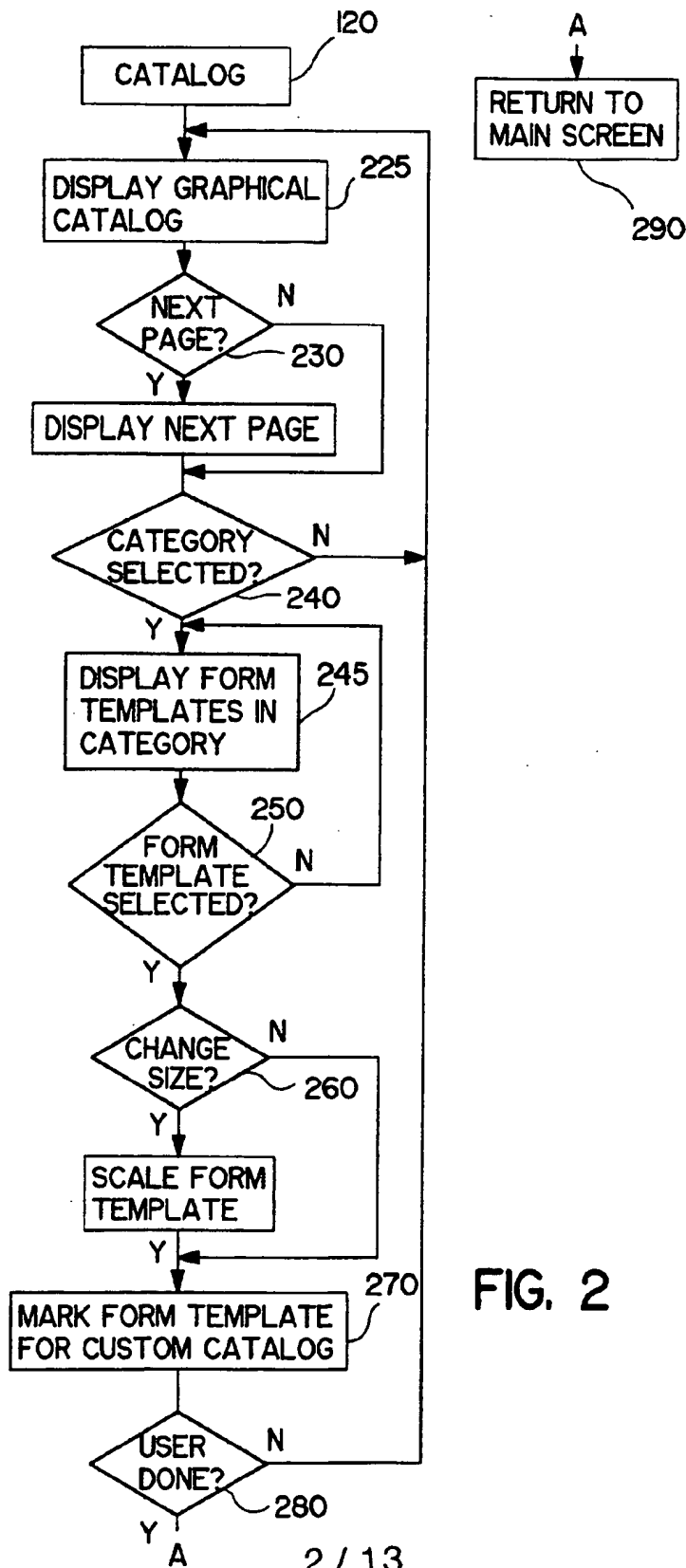


FIG. 2

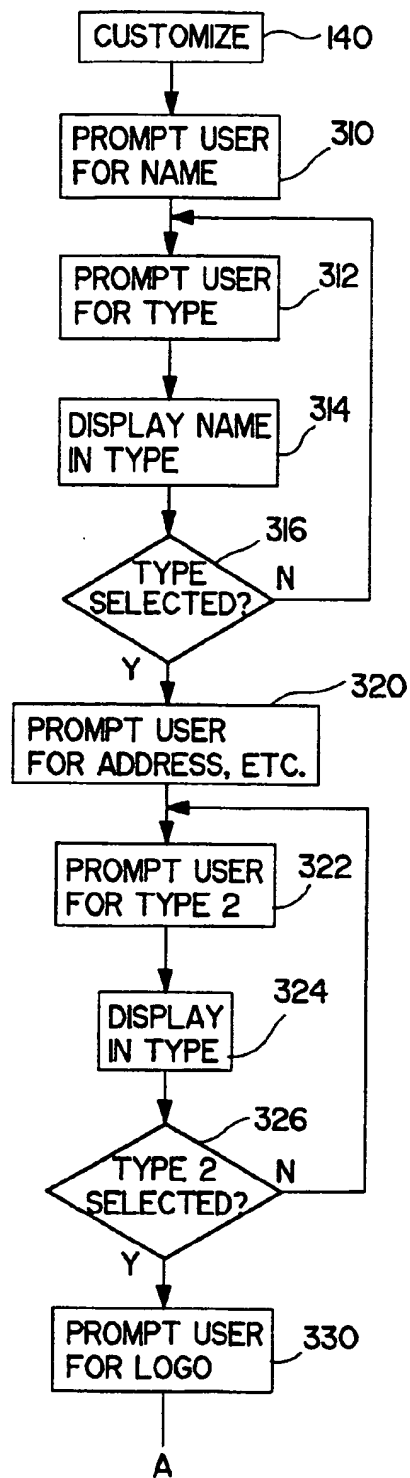


FIG. 3A

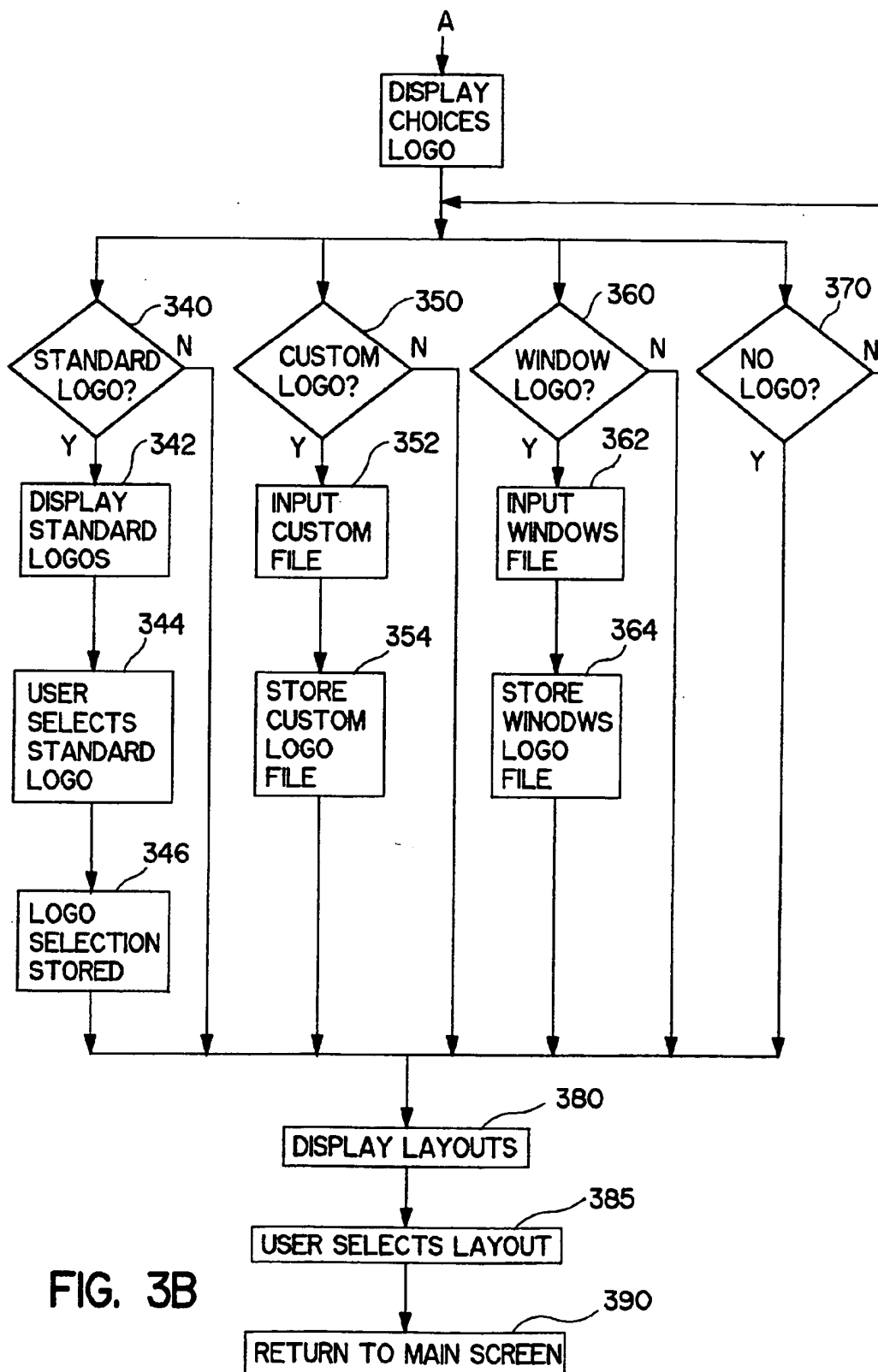


FIG. 3B

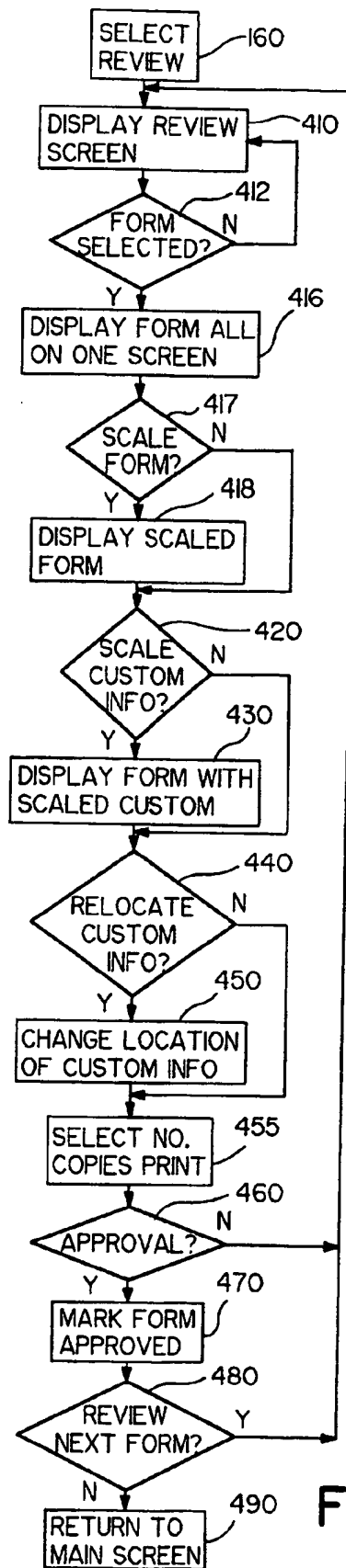


FIG. 4

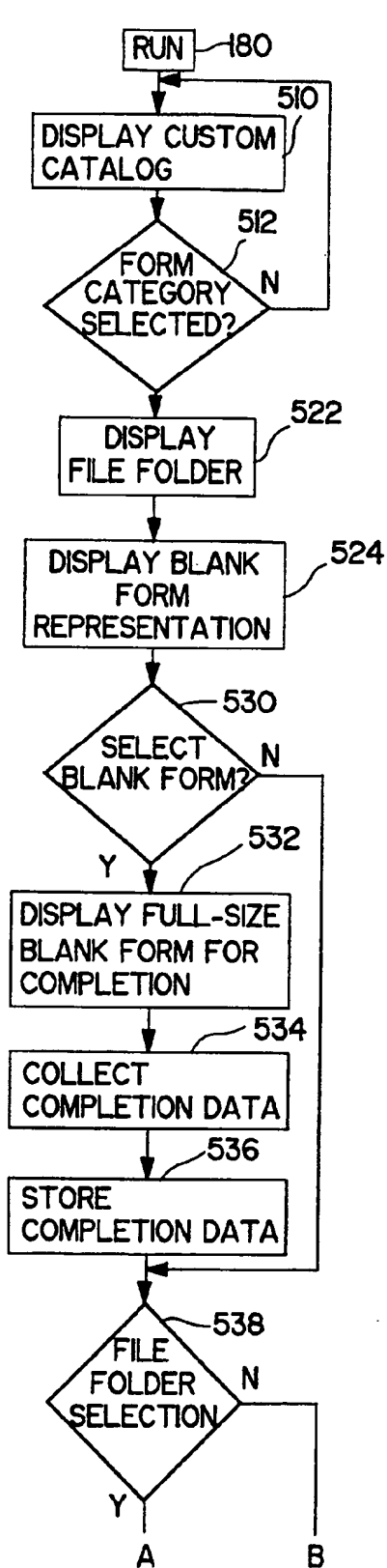
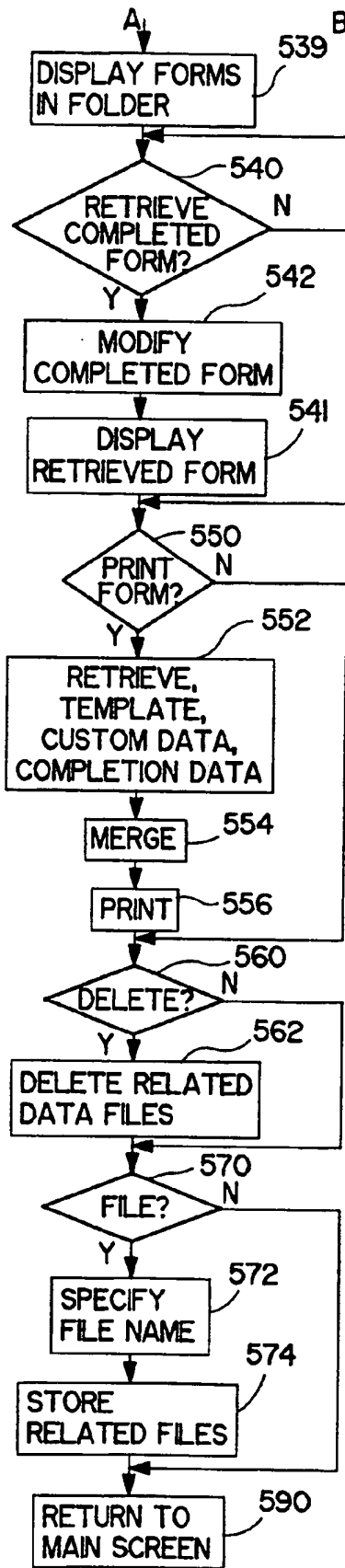


FIG. 5



Forms Plus

EXIT Exit

Please click one of:

1. Catalog: Select your forms and variations.
2. Customize: Establish company name and address, and appearance.
3. Review: Review selections.
4. Run: Fill in forms.

✓ Done

Catalog

✓ Done

Customize

✓ Done

Review

Proceed

Run

FIG. 6

Forms Plus-Catalog

1

2

3

4

Back to Steps

More

More

Click on a form button to see the variations available for that form.

|                                     |                      |                           |                      |
|-------------------------------------|----------------------|---------------------------|----------------------|
| <div>Included</div> <div>Memo</div> | <div>Fax</div>       | <div>Expense Report</div> | <div>Filler 01</div> |
| <div>Filler 02</div>                | <div>Filler 03</div> | <div>Filler 04</div>      | <div>Filler 05</div> |
| <div>Filler 06</div>                | <div>Filler 07</div> | <div>Filler 08</div>      | <div>Filler 09</div> |

FIG. 7

Forms Plus--Customize

12 Back to

34 Steps

Type your company name and address into the boxes provided. You can include telephone and Fax numbers in the address box if you desire. Select typefaces for the name and address from the corresponding boxes. Click on continue when you are done

Please enter your company name:

JetForm Corporation

Please enter your company address:

Suite 400  
560 Rochester Street  
Ottawa

Select a type style:

Arena Outline

ArenaBlackExtended

Arial

Aristocrat

Astute

Avian

Bailey

Basset

Select a type style:

Arena Condensed Light

Arena Outline

ArenaBlackExtended

Arial

Aristocrat

Astute

Avian

Bailey

Select Logo File...

Continue...

FIG. 8



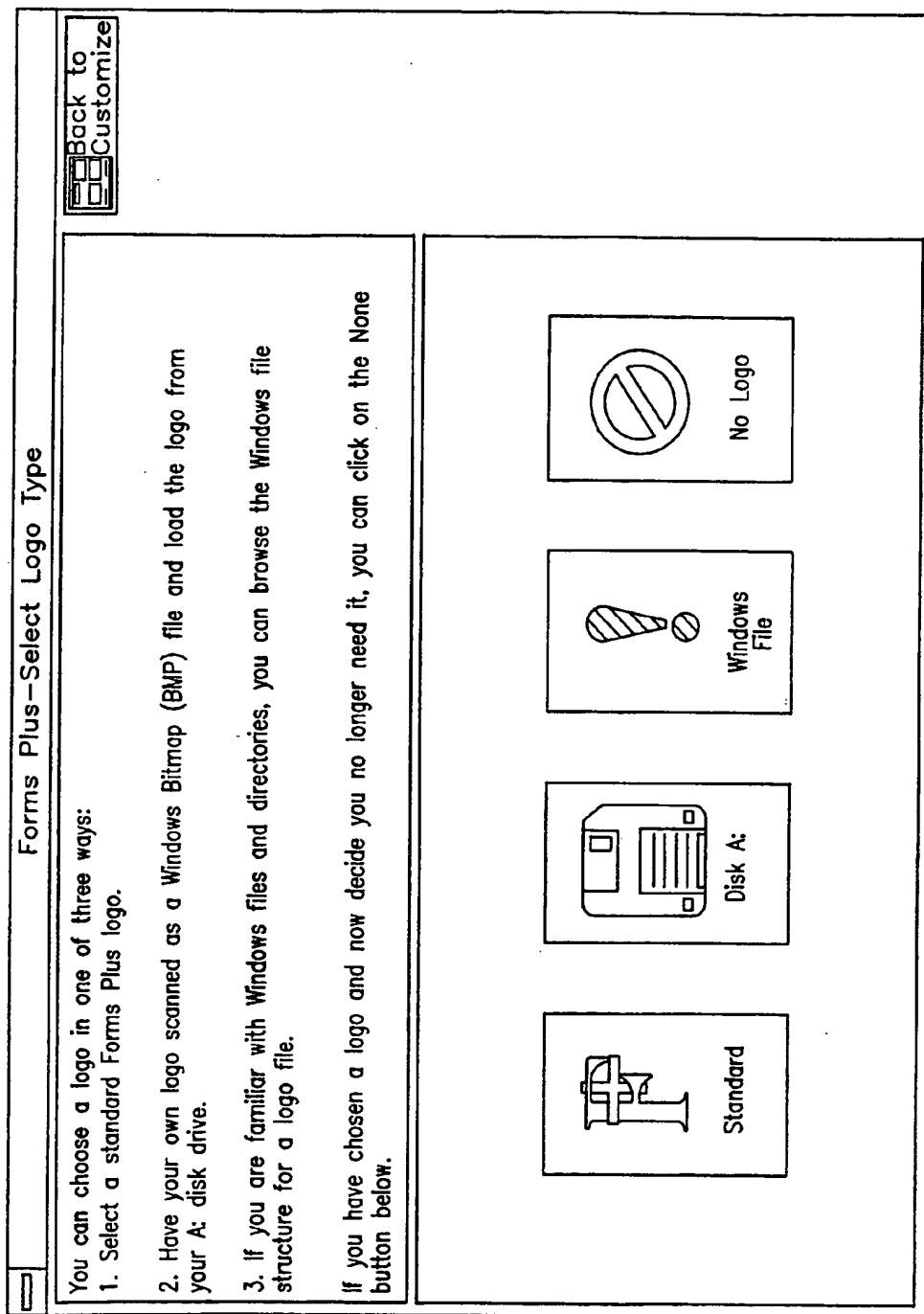


FIG. 9

Forms Plus-Layout Selection

1234 Back to Steps

More

More

Please choose the layout you like best by clicking on the small button beside it. Alternatively, click on the large button to see the layout enlarged

|   |   |
|---|---|
| <div> <div>Not Selected</div> <div> <div>JetForm Corporation</div> <div>Suite 400<br/>560 Rochester Street<br/>Ottawa</div> </div> <div>Layout 1</div> </div> | <div> <div>Not Selected</div> <div> <div>JetForm Corporation</div> <div>Suite 400<br/>560 Rochester Street<br/>Ottawa</div> </div> <div>Layout 2</div> </div> |
| <div> <div>Selected</div> <div> <div>JetForm Corporation</div> <div>Suite 400<br/>560 Rochester Street<br/>Ottawa</div> </div> <div>Layout 3</div> </div>     | <div> <div>Not Selected</div> <div> <div>JetForm Corporation</div> <div>Suite 400<br/>560 Rochester Street<br/>Ottawa</div> </div> <div>Layout 4</div> </div> |

FIG. 10

Forms Plus—Review

Click on a form button to see the full form on your screen.

1 2 3 4 Back to Steps

More More

Accepted

Memo

Accepted

Fax

Not Accepted

Expense Report

FIG. 11

Forms Plus—Run

1

2

3

4

Back to Steps

More

More

Expense Report

Fax

Memo

FIG. 12

## INTERNATIONAL SEARCH REPORT

International Application No.

PCT/US 94/10236

A. CLASSIFICATION OF SUBJECT MATTER  
IPC 6 G06F17/24

According to International Patent Classification (IPC) or to both national classification and IPC

## B. FIELDS SEARCHED

Minimum documentation searched (classification system followed by classification symbols)

IPC 6 G06F

Documentation searched other than minimum documentation to the extent that such documents are included in the fields searched

Electronic data base consulted during the international search (name of data base and, where practical, search terms used)

## C. DOCUMENTS CONSIDERED TO BE RELEVANT

| Category * | Citation of document, with indication, where appropriate, of the relevant passages   | Relevant to claim No.     |
|------------|--|---------------------------|
| X          | PROCEEDINGS OF THE 14TH ANNUAL<br>INTERNATIONAL COMPUTER SOFTWARE &<br>APPLICATIONS CONFERENCE, 1990, CHICAGO, US<br>pages 255 - 260, XP000223616<br>T.J. FAN ET AL 'FormPlus: A Form Authoring<br>Toolkit'<br>see the whole document<br>--- | 1,3,4,6,<br>8,9,11,<br>13 |
| X          | EP,A,0 481 784 (MOORE) 22 April 1992<br>see page 2, line 37 - page 3, line 30<br>---   | 6,8,9                     |
| A          | EP,A,0 478 335 (XEROX) 1 April 1992<br>see the whole document<br>---   | 1-14                      |
| A          | EP,A,0 483 664 (BORLAND) 6 May 1992<br>see page 2, line 30 - page 3, line 26<br>---  | 1-14                      |
|            | ---<br>-/--  |                           |

☒ Further documents are listed in the continuation of box C.☒ Patent family members are listed in annex.

## \* Special categories of cited documents:

- \*A\* document defining the general state of the art which is not considered to be of particular relevance
- \*E\* earlier document but published on or after the international filing date
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Date of the actual completion of the international search

23 December 1994

Date of mailing of the international search report

06.01.95

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Authorized officer

Pottiez, M

# INTERNATIONAL SEARCH REPORT

International Application No

PCT/US 94/10236

## C.(Continuation) DOCUMENTS CONSIDERED TO BE RELEVANT

| Category * | Citation of document, with indication, where appropriate, of the relevant passages          | Relevant to claim No. |
|------------|---|-----------------------|
| A          | EP,A,0 376 420 (SOFTVIEW) 4 July 1990<br>see column 3, line 19 - column 4, line 14<br>----- | 1-14                  |

# INTERNATIONAL SEARCH REPORT

Information on patent family members

International Application No

PCT/US 94/10236

| Patent document<br>cited in search report | Publication<br>date | Patent family<br>member(s) | Publication<br>date |
|---|---------------------|----------------------------|---------------------|
| EP-A-0481784                              | 22-04-92            | AU-B- 4895693              | 23-12-93            |
|   |                     | AU-A- 8596591              | 30-04-92            |
|   |                     | JP-A- 4282275              | 07-10-92            |
| EP-A-0478335                              | 01-04-92            | CA-A- 2048794              | 29-03-92            |
|   |                     | JP-A- 4299662              | 22-10-92            |
| EP-A-0483664                              | 06-05-92            | CA-A- 2054026              | 01-05-92            |
| EP-A-0376420                              | 04-07-90            | US-A- 5144693              | 01-09-92            |
|   |                     | AU-A- 4700189              | 05-07-90            |
|   |                     | CA-A- 1330123              | 07-06-94            |
|   |                     | JP-A- 3110665              | 10-05-91            |
|   |                     | US-A- 5208906              | 04-05-93            |
|   |                     | US-A- 5148520              | 15-09-92            |

